

## **CARMICHAEL WATER DISTRICT JOB DESCRIPTION**

**Job Class:** Billing Specialist Series (BS1 – BS2)  
**FLSA Status:** Non-Exempt  
**Supervisor:** Billing Supervisor  
**Effective Date:** July 1, 2019

### **Description**

Under supervision, perform skilled and technical work with regard to billing water service activities to include Accounts Receivables (e.g. preparation of billing statements and collection notices; collections; records; processes); and customer service. Organize and prioritize assigned workload in order to complete assigned activities and projects.

### **Distinguishing Characteristics**

**Billing Specialist 1 (BS1):** This is the intermediate level class in the Billing Specialist series. Specialists in this class are required to be fully trained in all procedures related to assigned areas of responsibility. Distinguished from other classes within the series by the knowledge and ability to perform the full range of duties assigned at an advanced and independent level and may assume responsibility of the billing functions in the absence of the Billing Supervisor.

**Billing Specialist 2 (BS2):** This is the journey level class in the Billing Specialist series. Specialists in this class are required to be highly trained in all procedures related to assigned areas of responsibility. Distinguished from other classes within the series by the knowledge and ability to perform the full range of duties assigned at a proficient and independent level including assuming responsibility of the billing and customer service functions in the absence of the Billing Supervisor.

Specialists may be advanced provided they meet the required education, experience, and minimum qualifications for the job class as described in the Billing Specialist Series job description.

### **Supervision Received and Exercised**

**Billing Specialist 1 (BS1):** Receives immediate direction from the Billing Supervisor or District Designated Representative; and may receive technical and functional direction from other journey level staff. May exercise technical and functional direction over less knowledgeable or experienced billing staff.

**Billing Specialist 2 (BS2):** Receives immediate direction from the Billing Supervisor or District Designated Representative; and may receive technical and functional direction from other journey level staff. Exercise technical and functional direction over less knowledgeable or experienced billing staff.

### **Essential Duties and Responsibilities**

The following duties are typical for this classification series. Depending upon the assignment, the employee may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices. Management retains the right to add, remove, or change duties at any time.

- Perform a variety of duties associated with billing and collections.
  - Compile and maintain comprehensive records of water accounts and property transactions.
  - Administer and perform all billing and collection functions, ensuring accurate billing records and timely mailing of all statements.
  - Make all necessary account adjustments; create and enter all journal entries for adjustments.
  - Track delinquent accounts; prepare, process, mail and maintain liens.
  - Maintain meter data in billing system.

- Respond to a variety of public inquiries and resolve issues related to water service and billing.
- Interpret, understand, apply, and explain billing rules, procedures, policies, codes, and ordinances.
- Assess current billing operations, offer recommendations for improvement and implement new processes.
- Perform advanced accounts receivable tasks and related revenue support work (timely and accurately) including: reconciliation, statistical records, and mathematic computations (e.g. interest and penalties).
- Maintain water rates in billing system.
- Perform a variety of duties associated with customer service and general support.
  - Process petty cash reimbursements; balance and maintain the petty cash fund.
  - Provide training to other employees in the areas of billing, collections, and reporting.
  - Coordinate resolution of issues related to water service and billing with various departments.
  - Provide back up and assistance to other Administrative Services staff.
- Perform a variety of duties associated with reports and correspondence.
  - Gather information and data, conduct research.
  - Collect and record program data for statistical reports.
  - Compose and prepare clear and concise reports and correspondence.
- Assume responsibility of the billing and customer service functions in the absence of the Billing Supervisor.
- Attend, support and participate in training.
- Build and maintain positive working relationships with co-workers and the public using principles of good customer service.
- Comply with all District policies, procedures, rules and regulations including all safety standards, programs and procedures (e.g. Policy Manual, Rules and Regulations Manual, Emergency Response Plan, IIPP, etc.).
- Maintain regular attendance and adhere to prescribed work schedule to conduct job responsibilities.
- Ensure all work performed is completed to District standards.

**Additional Essential Duties and Responsibilities for Billing Specialist 2**

- Assume responsibility of the billing and customer service functions in the absence of the Billing Supervisor.

**Qualifications**

**Billing Specialist 1 (BS1):**

Billing Specialist 1 (BS1) must possess ***advanced knowledge and advanced abilities*** identified below:

*Knowledge of:*

- Principles and practices of lead billing (e.g. billing, revenue and collection process and procedures).
- Principles and practices of accounting.
- Principles and practices of lead supervision.
- Customer service techniques and conflict resolution.
- Regulatory standards and compliance requirements.
- Advanced mathematics.
- Methods for conducting and interpreting data collection and reporting.
- Standard safety practices and programs.
- General office procedures (e.g. telephone, filing, typing).
- Computer software programs (e.g. billing, financial, Microsoft Suite [Word, Excel, Outlook, and PowerPoint]).
- Correct English usage, spelling, grammar and punctuation.

- Strong written and verbal interpersonal and communication skills.

*Ability to:*

- Work independently, demonstrating initiative and independent thinking.
- Learn and perform a variety of office support assignments.
- Perform advanced mathematical calculations accurately including statistical records and computations (e.g. interest and penalties).
- Analyze and record accounting transactions.
- Compose and prepare appropriate reports.
- Prepare and organize a variety of information.
- Understand, interpret and apply laws, rules, regulations and ordinances relating to District activities.
- Solve problems and provide corrective action with little or no supervision.
- Explain billing and customer service processes clearly and concisely.
- Effectively train less qualified personnel.
- Assume responsibility of the billing and customer service functions in the absence of the Financial Services Supervisor.
- Respond to public, vendor, and co-worker requests in a timely, tactful, courteous and effective manner.
- Communicate clearly and concisely both orally and in writing with District management, co-workers, and the public in one-to-one and group settings.
- Follow both oral and written instructions.
- Perform assigned duties.
- Perform duties in a professional manner and work well with others or in a team setting.
- Effectively represent the District in a positive and professional manner at all times with the public, community groups, contractors, and other organizations.
- Establish and maintain cooperative working relationships.
- Exercise good judgment.
- Effectively manage time and workload to maximize productivity.
- Maintain regular attendance and adherence to prescribed work schedule to conduct job responsibilities.
- Adhere to safe work practices.
- Skillfully operate a variety of standard office equipment (e.g. computers, copier, postage and fax machines, 10 key, etc.), telephone, electronic devices (e.g. laptop, smart phone, etc.), personal computer and proficient with software applications (e.g. email, word processing, spreadsheets, and other job-related software (e.g. CSM and Great Plains)).
- Change working hours or work overtime including nights and/or weekends.

Billing Specialist 2 (BS2):

Billing Specialist 2 (BS2) must possess ***proficient knowledge and proficient abilities*** of Billing Specialist 1 (BS1).

**Physical Requirements**

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. *Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.*

- Regularly work in an office environment:
  - Work at a desk/table for an extended period of time; sit and stand for an extended period of time.
  - Ability to bend (neck and waist), squat, climb, crouch, stoop, kneel, twist, grasp, fine manipulation, push, pull, reach (above and below shoulder level), balance, stand, walk.
  - Ability to reach, lift, carry and move objects up to 25 pounds (e.g. storage boxes, large binders, books, outreach materials and supplies, tables, chairs, popup shade structures, etc.).

- Repetitive use of hands.

### **Environmental and Working Conditions**

The environmental and working conditions herein are representative of those an employee encounters while performing the essential functions of this job. *Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

- Regularly work in ambient room temperatures, lighting and traditional office equipment as found in a typical office environment.
- The performance of this position may occasionally require exposure to job site, distribution and production areas where:
  - Certain areas may require the use of personal protective equipment such as hard hats, safety glasses and hearing protection.
  - May be around machinery with moving parts or stationary equipment; near hazardous chemicals; exposed to fumes/smoke/gases.

### **Education, Experience and Certifications**

*Required:*

- High school diploma or equivalent

#### **Billing Specialist 1**

- Three (3) full-time years of increasingly responsible experience performing Accounts Receivable (including billing and collections), customer service, and cash management including two (2) full-time years equivalent to a Billing Support 2 with the Carmichael Water District.

#### **Billing Specialist 2**

- Four (4) full-time years of increasingly responsible experience performing Accounts Receivable (including billing and collections), customer service, and cash management including two (2) full-time years equivalent to a Billing Specialist 1 with the Carmichael Water District.

*Desirable:*

Any combination of education and experience which would likely provide the desired knowledge and abilities is acceptable. A typical way to obtain the knowledge and abilities would be:

#### **Billing Specialist 1**

- One (1) year of college level general accounting courses in addition to the above requirements.

#### **Billing Specialist 2**

- An Associate Degree, with major course work in Accounting, or a certificate in accounting from an accredited college in addition to the above requirements.

### **Licenses**

**License and Certification Maintenance: Employee is responsible to complete the designated number of contact hours (i.e.: continuing education and/or training requirements) and licensing requirements to maintain all required licenses and certifications as a condition of continued employment.**

***NOTE: The specific statements shown in each section of this job description are not intended to be all-inclusive. They represent typical elements and criteria that are performed by most incumbents, but other related duties may be performed. Not all duties listed are necessarily performed by each individual.***